Networks hit for ad clearance cuts

By RICHARD L. GORDON

The presidents of two national advertising associations have sharply attacked the Big 3 TV networks' latest cutbacks in their commercials clearance departments.

NBC last month revamped its broadcast standards department, cutting the number of professionals assigned to commercials clearance. CBS reduced staffing in its advertising standards unit more than a year ago.

ABC, which made cutbacks over the past two years, is expected to make more trims this year.

The network staff units review tens of thousands of commercials a year and are a major cog in the ad industry's self-regulation system.

In separate letters to the chairmen of NBC, CBS and ABC, American Association of Advertising Agencies President Leonard S. Matthews and Association of National Advertisers President DeWitt F. Helm Jr. denounced the "virtual elimination" and "continuing diminution" of the networks' broadcast standards process.

"We have long argued against government intrusion because the advertising and broadcast industries were doing such a good job policing themselves," Mr. Matthews wrote. "However, diminution of the self-regulatory process can only weaken the entire broadcast/advertising industry position and will invite government regulation to fill the void."

The staff cutbacks "play into the hands of our critics and adversaries and the would-be 'do-gooders,' " Mr. Helm wrote, "and provide them with the ammunition they need to maintain that government regulations must be enacted to fill the void in protecting the marketplace, and only after great criticism of and costs to the industry."

The ANA board is expected to review the situation when it meets this week.

American Advertising Federation President Howard Bell said AAF, which includes the networks as members, hasn't taken any formal position, but he "hopes nothing is done to weaken the self-regulation of advertising."

The Four A's and ANA letters followed NBC's reorganization of its 60-person broadcast standards department into what's expected eventually to be a 20-person "program marketing and administration" unit dealing with programming matters and an eight-person advertising standards unit.

Only three commercials editors are now assigned directly to pre-clearing commercials, down from five. Several years ago there were eight.

NBC "intends to maintain the same level of quality service. These are our clients, these advertisers," said Rick Gitter, VP-advertising standards.

"I appreciate their concern," Mr. Gitter said of the association letters. "The very clear intention here—and the intention of the company—with regard to advertising standards is to continue to perform the function."

ABC, in a response to the Four A's letter last week, said "the essential activities supporting our responsibility and accountability as broadcasters remain a corporate commitment."

Staff cutbacks that swept through CBS more than a year ago cut in half its program practices department, which includes the ad review unit.

Beyond the ad clearance units' role as important standard setters for national TV advertising, their smooth operation is vital for the day-to-day functioning of advertisers and agencies.

About 50,000 scripts and storyboards are submitted for review by the networks every year.

Delays in the review and approval of network commercials could easily upset ad timetables and marketing strategies.

"We don't have any less need now that they have less staff," said Carla Michelotti, senior VP-associate general counsel at Leo Burnett Co., Chicago. "We work on very short timetables. We trust services will continue."

Advertisers also take complaints about competitors' advertising to the networks under "challenge" procedures.

NBC said some 65 to 85 challenges are reviewed every year.#

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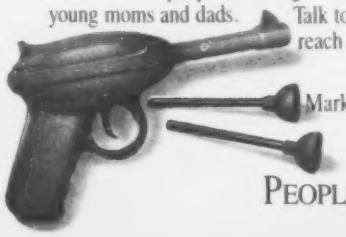

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Champion seeks shop

TOLEDO, OHIO—Champion Spark Plug Co.'s switch to regional advertising is behind the search for a new agency for its $9.5 million account.

Champion and Scali, McCabe, Sloves, New York, agreed to end their two-year relationship as part of the marketer's new strategy to concentrate on market-by-market, rather than national, advertising, said George Braatz, Champion's manager of corporate communications.

The company, which markets Champion and Anco automotive products, recently named 13 regional marketing specialists in 13 geographic divisions nationwide. Now the marketer is looking for an agency with regional offices and capabilities that's based closer to its headquarters here.

It's too early to say how Champion's ad budget will be affected, Mr. Braatz said, adding that the company will continue to do some national advertising.#

CORRECTIONS & CLARIFICATIONS

- Gunder & Associates, Dublin, Ohio, is the agency assigned to White Castle System's children's marketing program and, as such, produced its children's Castle Meal premium commercial (AA, Aug. 29, P. 56). Lord, Sullivan & Yoder, Columbus, which was erroneously credited, handles White Castle's adult restaurant advertising.
- Regarding AA's "Beverage Marketing Special Report," Aug. 15: "Top U.S. beer brands" and "Top imported beers" listed in the Data Bank charts (P. S-6) should be footnoted: 1987 national grocery store market projections that don't include bar or liquor store sales. Also, charts on beverage advertising (S-6, S-13) should read ($ in thousands), not ($ in millions). The figure for bottled water spot TV advertising is $11.8 million; network spending is NA.#

Special Report

After buying binge, what?

Flurry of acquisitions leads to owners asking how to best use sales promotion capabilities; the answer, it seems, is to involve shops from the very beginning

By Scott Hume

Sales promotion is destined to become either marketing's Pet Rock or its gemstone.

Suddenly everybody wants a sales promotion agency—they're small, they're cute, they're relatively inexpensive. But the tough part is figuring out what to do with sales promotion capabilities once you have them.

Estimates vary on the dollars spent annually on trade and consumer sales promotion, but there is no disagreement that promotion's share of total marketing now is 60% to advertising's 40%, when the opposite was the case less than a decade ago. And the gap between the disciplines is expected to widen before it closes.

Manufacturers' increasing needs for local and regional marketing strategies and tactics that can produce short-term sales boosts are fueling promotion's rapid growth and media advertising's stagnation. Understandably, that has elicited some cockiness on the part of some execs on the non-media side of the fence.

Says John Kawula, president of the Point-of-Purchase Advertising Institute, "Except for Ginsu knives and Rosemary Clooney records, sales occur within a retail store, not in front of a TV set or by flipping through the pages of a magazine."

But sales promotion's popularity comes as it faces some tough choices. It has outgrown its genesis as a supplier of novelty items and corrugated cardboard displays. The business' future lies in providing marketing strategy—involvement with clients from the start—rather than in being called in later to implement pre-selected tactics.

As a result sales promotion increasingly will overlap advertising agencies' role with clients as well as eat away at advertising's share of budgets.

"To some extent, ad agencies are buying promotion agencies under an 'Eat or be eaten' threat," says one top sales promotion executive. "Advertising wants sales promotion, needs sales promotion but also fears sales promotion's growth."

How sales promotion and other non-media marketing communications are merged with traditional advertising may determine the structural makeup of ad agencies into the next century.

American ad agencies, many of which realized too late promotion's importance, may be missing the boat again.

Under the American plan of action, sales promotion is one of several "secondary" marketing services—along with direct marketing, public relations, Hispanic marketing, product design and others—that advertising agencies maintain as tactical arrows within their quivers. When needed, these units are called forward.

Several British companies are pursuing a different course that may prove the wisest, equally integrating all services under a broad marketing-communications umbrella. The key concept is synergy rather than separatism.

American ad agency executives have never understood sales promotion and still undervalue it, charge critics on both sides of the Atlantic. That's why some of the top sales promoters here now report to London-based bosses.

"In the U.K., the promotion business is about five years ahead of the U.S. in all respects," Joseph Flanagan, president of the Impact agency and the Council of Sales Promotion Agencies, conceded in a recent speech. "As evidence of this, client/sales promotion agency relationships have matured to the level that seven promotion

(Continued on Page S-2)

Promotion masters see field grow to maturity

A discussion with Davidson, Frankel and Robinson

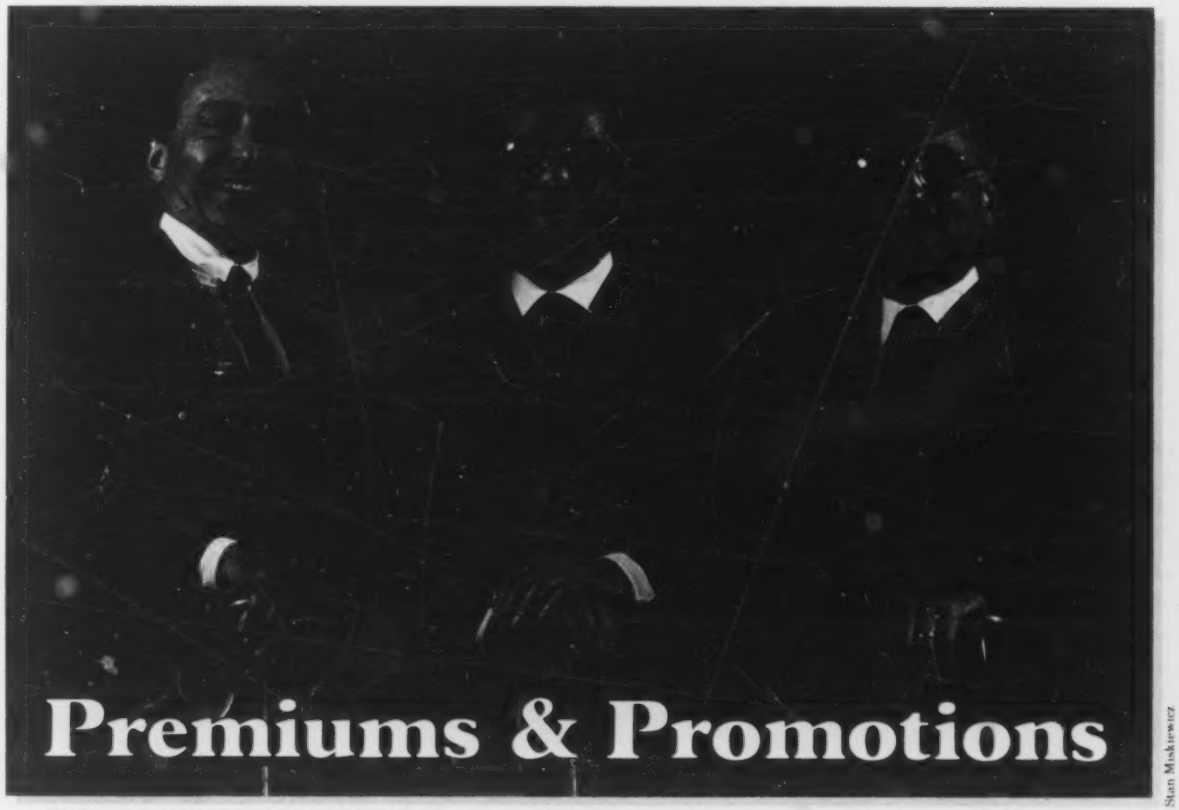
By Norma Green

If a Chicago School of Sales Promotion exists, Bill Davidson, Bud Frankel and Bill Robinson are its founding faculty.

The three sales promotion company heads worked together at Kling Studios and at William A. Robinson Inc. in the industry's formative days, and still get together at periodic "mafia dinners" initiated by Mr. Robinson.

They represent three different types of sales promotion companies found in the marketplace: Mr. Frankel heads the largest independent promotion agency in the U.S. with 280 persons in three offices; Mr. Robinson just sold his 50-person two-office agency to Ketchum Communications, and Mr. Davidson runs a 25-person independent shop.

Recently, they got together for a wide-ranging discussion concerning the evolution and future of sales promotion.



Stan Maskiewicz

Bill Robinson, Bud Frankel and Bill Davidson run three different types of sales promotion companies but come from the same roots.

One heck of a living

AA: How did you first discover the field of sales promotion?

Davidson: I first heard of it after I had come from an ad agency. I think my first question to Bill was, "Are you really able to make a living doing it?" I guess we're still trying to find the answer to that one.

But we were truly in the infancy of it. I don't think the sales promotion agency existed at that time [the 1950s].

Robinson: No, I don't think so. It was really collateral material business when we started out.

Davidson: A lot of printers and art studios hired copywriters and they'd become instant sales promotion firms. But, the true sales promotion agency as we know it today, was a response to the professionalization of marketing in the schools. And I think it raised the level of marketing and promotion generally.

Frankel: The M.B.A.s started to ask questions that we were never asked before.

Davidson: Certainly Bill and I first found this with Procter & Gamble.

Robinson: The other thing that was happening was printers used to hire artists to make sketches to sell printing and we came along and said, "Let's start doing some planning or let's not give the sketches away." We started digging in our heels and said, "Hey, we ought to get paid for these ideas."

Davidson: That's when they [ideas] began to be called concepts. I think we give them much more care and thinking today than we did in those days.

At that time, we gave a great deal of thought to display designs and the cutting of cardboard and the shaping of motors. The linkage of displays was perhaps every bit as important as the objectives and strategies then.

Frankel: The client was very specific about what they wanted and you just had to fill in the blanks. We were a reactive, service-oriented creative

(Continued on Page S-4)

Norma Green is a frequent contributor to ADVERTISING AGE *Profiles Issues.*

After buying binge, what?

(Continued from Page S-1)
agencies are now publicly held and traded on the London Stock Exchange."

These British companies, which one U.S. agency exec not so affectionately collectively calls "the Alphabet Group," also have been actively acquiring CSPA member agencies.

KLP Group has snapped up Comart Associates, ranked second among U.S. full-service promotion agencies by ADVERTISING AGE (AA, April 4), as well as direct marketer Metro Seliger Industries, and market researcher Field Research Corp.

WPP Group, already the owner of J. Walter Thompson, acquired ninth-ranked Einson Freeman.

Not to be outdone, FKB Group bought a four-pack of U.S. promotion shops: No. 6-ranked QLM Associates; No. 13 Focus Marketing; No. 27 Hermann Group, and unranked Saugatuck Group.

Some agencies that went the
(Continued on Page S-4)

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DATA BANK

The feeding frenzy continues

Sales promotion agency acquisitions

Acquired shop, location	Buyer	1987 gross revenues ($000,000)	Transaction date
Einson Freeman, Paramus, N.J.	WPP Group	$6.3	May 1988
William A. Robinson Inc., Chicago	Ketchum Communications	3.3	May 1988
Saugatuck Group, Westport, Conn.	FKB Group	4.2	March 1988
Focus Marketing, Norwalk, Conn.	FKB Group	4.1	March 1988
Hermann Group, St. Louis	FKB Group	1.6	March 1988
QLM Associates, Princeton, N.J.	FKB Group	7.2	March 1988
Morton Goldberg, New York	Scali McCabe Sloves	N A	Dec. 1987
Thomson-Leeds Co., New York	Ogilvy Group	3.7	Nov. 1987
Alert Marketing, Waterbury, Conn.	Ogilvy Group	2.7	Nov. 1987
U.S. Concepts, New York	Howard Marlboro Group	2.0	Sept. 1987
Hammond & Lalli Associates, Port Chester, N.Y.	DelWilber & Associates	1.5	July 1987
Jerry Moss Inc., New York	Kettering Industries	3.1	July 1987
Comart Associates, New York	KLP Group	12.9	June 1987
Joseph Potocki & Associates, Edison, N.J.	Clarke Hooper	10.0	June 1987

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Masters of promotion

(Continued from Page S-1)
business.

Robinson: When there began to be a sense of parity among products, either the clients or we began to realize that paper cardboard premium displays could be tiebreakers for the sales organizations. If we came up with stuffed animals and buttons and whistles, a sales organization could go out and sell merchandise where before they didn't have much to talk about.

Frankel: Today, the display fixture is part of the deal the trade expects. The things we were doing in those days were breakthrough. Today, it's just standard stuff.

Robinson: Looking backwards, the '60s was a decade of hard goods and we've taken much of our growth from that. In the '70s, we found a lot more package goods. As the '80s approached most of us saw that high technology and service industries would dominate much of the growth.

Our companies tried to look ahead in terms of these categories. Certainly individual areas like auto, liquor or fragrances and, of course, fast-service restaurants, have always been interesting areas.

Fast food and 1992

AA: What about the '90s?

Davidson: I think package goods are still viable, and fast-food restaurants.

Robinson: We've looked ahead at industries that have been deregulated—the financial area, transportation. When they were regulated, they weren't marketers and today they're spending so much. High tech areas will continue to grow.

Frankel: I think the organizations we have built in the past will not succeed in the '90s. We've got to better integrate the disciplines required to do an intelligent marketing job.

One of the keys to our success is that budgets have moved from an extreme of 90% advertising and 10% non-media to 65%-35% with non-media leading the way. Marketing management is looking at the outside services that they're buying. And they weren't looking at them before.

In years past, they'd have a $4 million ad budget and a $6 million trade and promotion budget. They'd hire the world's largest agency to handle the $4 million but the $6 million was relegated to three assistant brand managers and they said, "This is wrong. We need professional help."

Davidson: There is a breakdown taking place now through regionalization, the growth of local marketing, target marketing. You have to wonder about the difficulty of maintaining a broad national image in the face of fragmentation as the regions take more power.

That's quite a challenge for both the agency of the future and the marketer.

Frankel: All the things Bill is saying are true and that's generating a graying of divisions and disciplines. Advertising agencies are buying up the PR, promotion, direct response, audio-visual and design firms and they're trying to put it all together. The good news is that they've been unsuccessful. The bad news is that they're going to figure it out.

Robinson: Since the advertising agencies have the most to lose, they are the most

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Binge

(Continued from Page S-2)
acquisition route several years ago now are beginning to combine their non-media marketing agencies.

Young & Rubicam, one of the pioneers and still the epitome of the "American Plan" approach to marketing communications, moved in August to consolidate its various independent holdings. The huge, as yet unnamed, unit includes merchandising/sales promotion agencies Rogers Merchandising and Cato Johnson/Y&R, as well as design companies CYB and Beautiful!, Paris; Krown, which develops TV and movie promotion, and Y&R Retail.

The problem, say critics of the separate-but-equal approach, is that no matter how you play with the lines of command, as long as sales promotion and direct-marketing functions operate as separate, subservient profit centers, true integration with advertising operations will never occur.

One of those critics is Bud Frankel, chairman of Frankel & Co., Chicago, the largest full-service promotion agency in the U.S.

He has been courted by almost every top agency in the world but has resisted merger and buyout overtures because "when I ask what it is that *they* are bringing to the party, their answer is always 'Money.' And that's not enough. What's needed is a new structure.

"Agencies want sales promotion units so they can parade them in new-business pitches. But as it stands now, the management rep heading an account at an advertising agency has to be crazy to recommend that a client take part of his budget to the sales promotion unit, even if the agency owns it. That's money out of his bonus going out the door," Mr. Frankel says.

"I'm not saying that the British approach is necessarily better," he added. "Perhaps there needs to be a completely new way to thoroughly integrate all marketing communications into a more equitable structure."

KLP Group has positioned it-

highly motivated to keep in step.

Frankel: Marketers look at all their audiences and they break it down—consumer, trade, distributors, sales forces, etc.—and they are refocusing on the needs of their business rather than just historically putting budgets in place. That's motivating the ad agencies to chase the disciplines because they, too, are recognizing this.

Robinson: Agencies are not only looking for the synergy of services, they're looking for lost revenue.

Davidson: I think the current move toward mergers has the most to do with the value of the dollar because a great deal of internationalization is taking place. The client is getting the short end of this.

Globalization, internalization is certainly coming, regardless of the value of the dollar. The global community is here.

Frankel: And in 1992, it will be here in spades.

Davidson: You're talking about the European community and the dropping of trade barriers. The opportunities over the next 20 years for exposure into Europe are great. The opening of the European community and greater access into Eastern Europe will provide the people who follow us over the next 10 or 20 years with marvelous opportunities.

Frankel: Wait a moment. The assumption is that we're not going to be around for the next 10 or 20 years. We better be part of it because there's too much damn excitement to walk away now.

The future is still ill defined. We don't know whether the influence is going to come from the client, ad agencies, organizations like ours, the Brits, the French, Japanese. All I know is that it must be client-centered.

Chicago and service

AA: Do you see yourselves as part of a Chicago School of Promotion?

Frankel: I really do. I don't see the kind of depth and kind of disciplines coming from organizations outside of Chicago.

Davidson: Perhaps the Chicago-based agencies seem to exhibit more creativity. A more earthy form of creativity, perhaps . . . maybe it's our Midwestern character.

Frankel: It's not a Chicago issue, it's an industry issue. Where's the quality? Where is the depth? Where is the commitment? I see it in Chicago-based agencies where I don't see it in other places.

Robinson: Well, this is one of the few places where we disagree.

I think this was probably true 10 years ago. It was much less true five years ago. When you start looking at the pockets of expertise in Westport, Conn., New Jersey, and even New York and now in Southern California, I know there are some formidable competitors in those markets today.

Davidson: We've always had the feeling that the Westport agencies were more concerned with number crunching, even more than they were with the entire problem.

Once they'd developed the path of recommendations they thought the client should follow they frequently left the rest of it to the clients. In fact, we made that one of the things that differentiates our agency from the agencies in the East particularly.

Robinson: I think that's true of many of them. But more and more today, there are real full-service marketing communications and promotion agencies on the East Coast and the West Coast.

self as one of the most aggressive architects of a multinational organization that its executives believe is both more equitable and more in tune with the future. Its main difference is that it so far has no advertising "mass" at its core.

"What we're pursuing are really two separate strategies," says KLP CEO Gerry Postelthwaite. "One is geographic, creating or acquiring creative promotional agencies in New York, Chicago, San Francisco, Atlanta, Boston and Canada.

"The other is structural. We want that national network to encompass the entire range of response communications so that we can build total programs for clients.

"And we can do this without the central ad agency [that Saatchi & Saatchi or WPP Group have]," he says. "I think we may have to develop competence in the field of media, and we could do that through acquisition of a media-buying service perhaps. But I don't think we need to move into traditional media advertising."

That confidence in KLP's ability to grow without relying on advertising comes in part, he says, from the differences between the U.K. and U.S. advertising industries.

"The concept of the full-service promotion agency developed faster in the U.K. because fewer manufacturers had in-house capabilities as they do here," he said. "That accelerated development in the 1970s and allowed sales promotion to gain more importance."

One other difference will grow increasingly important in coming years.

"I think the British style not only is to accentuate the synergies that can exist between sales promotion and direct marketing, say, but between countries as well. I think we're taking a more global approach to networking marketing services companies," Mr. Postelthwaite says.

"The U.S. is bigger than Europe now, but after 1992 when all the marketing borders [separating European nations] disappear, that simply won't be true. A lot is going to change when that happens, and I think the strategy we're pursuing takes that into account."

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Denmark	44	6	68.6	72.5	57	Mazda
Finland	45	6	71.7	72.8	100	Mercedes
France	46	8	72.9	80.8	88	Renault
West Germany	46	6	105.1	116.6	82	Mercedes
Greece	47	9	27.6	29.8	75	Honda
Italy	44	5	74.0	79.1	70	Alfa
Luxembourg	42	6	85.4	88.7	88	Audi
Netherlands	42	8	79.0	83.6	100	Ford
Norway	45	5	65.6	68.9	100	Ford
Portugal	46	5	24.9	25.9	84	Alfa Romeo
Spain	45	8	64.6	69.7	50	N/A
Sweden	44	6	63.8	69.0	100	Volvo
Switzerland	43	6	120.8	136.9	60	Audi
U.K.	44	5	63.5	68.6	88	Ford

*Based on exchange rates for January 1988
**Base salary plus bonus
Source: Wyatt Co.'s 1988 Top Management Remuneration Study.

Diet soft-drink war invades So. Korea

By OLES GADACZ

SEOUL—It's not on the list of official events, but the race to grab a chunk of South Korea's diet cola market may be as exciting as the high jump at the Summer Olympics.

Coca-Cola Co. and Pepsi-Cola International are gearing up for the first battle between diet drinks in South Korea. Coca-Cola is introducing Diet Coke as the Games start Sept. 17; Pepsi introduced Diet Pepsi earlier this year.

Neither company is devoting big money solely in the diet segment, expected to be only 1% of the $555 million soft-drink market this year.

"Koreans don't really have weight problems. [Diet drinks] will take some time to develop," said Pepsi-Cola International's Kim Dong-Soo, regional director for East Asia.

Coca-Cola, which entered Korea in 1968, outsells rival Pepsi by more than 5-to-1. Coca-Cola holds about 85% of the South Korean cola category and Pepsi about 14%.

Oricom handles Coca-Cola's $3.5 million 1988 ad budget. Coca-Cola, which generally uses print and sales promotion, began stepping up TV spots last month and will run spots through this month.

As an official worldwide Olympic sponsor, the company will operate vending machines and run 115 food and beverage concessions in the Olympic venues.

Coca-Cola is supplying free soft drinks to the athletes, journalists, members of Olympic committees and other accredited attendees totaling about 120,000.

Also, the marketer is sponsoring two pin trading centers at two major Olympic venues and holding a local Olympic pin design contest, said Lee Yong-Il, Coca-Cola's manager for Olympic operations.

To counter Coca-Cola's Olympic sponsorship, "we have to use ambush strategies," Pepsi's Mr. Kim said.

Free Pepsi and Diet Pepsi will be offered to patrons of selected restaurants, including PepsiCo-owned Pizza Hut, on days when the South Korean team wins gold medals. Pepsi will give away 50,000 sun visors with its logo to spectators watching the marathon, cycling and other events.

On a 45-inch TV screen inside the Lotte shopping center—Seoul's largest—Pepsi will show videotaped highlights of the Games and U.S. Pepsi spots, including commercials featuring Michael Jackson.

Diet Pepsi was launched April 10 with the support of a one-month $70,000 print and direct-marketing campaign.

It's targeting "opinion leaders" in "prestige outlets"—hotels and supermarkets in affluent neighborhoods, Mr. Kim said. Daehong Advertising handles.#

Y IN CALIFORNIA
ARS OFF THE ROAD.

Consumer Reports had rated the tires "not acceptable" as a result of tread separation.

The Center for Auto Safety had written a cautionary letter. And the National Highway Traffic Safety Administration had requested an investigation.

Still, on the night of Moira Johnston's near fatal blowout, Firestone was continuing to sell defective "Firestone 500" tires by the hundreds of thousands.

So said Moira Johnston in an exclusive article in California Magazine. An article that was to affect the entire nation.

In "Hell on Wheels," Ms. Johnston documented the dangers of the "Firestone 500" tire.

She reported how Firestone had attempted to silence its critics with restraining orders and by threatening lawsuits.

She called for Federal authorities to investigate the allegations and force Firestone to pull millions of tires off the road.

And the Federal authorities listened.

"Hell on Wheels" is the kind of involving journalism rarely found in America today. But the kind of involving articles our readers expect to find in "California" every month.

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MAGAZINE

WILL JORDAN AS GENERAL PATTON

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Who's on top in Europe

Rank	Network	1987 European gross income	% change over '86	European billings '87	% change over '86	'87 European gross income as % worldwide	'87 European billings as % worldwide	Network's top European office in '87 billings	Office billings % European network
1.	Backer Spielvogel Bates	$248,231	37.8%	$1,457,960	31.2%	41.3%	35.8%	Dorland Advertising, London	22.7%
2.	Saatchi & Saatchi Adv.	229,602	27.3	1,553,141	28.7	33.1	33.7	Saatchi & Saatchi UK, London	49.1
3.	Ogilvy & Mather	218,164	40.2	1,355,713	36.6	41.3	37.0	Ogilvy Group Holdings, London	30.6
4.	McCann-Erickson	215,051	45.3	1,434,397	45.3	42.0	41.9	McCann-Erickson U.K., London	24.1
5.	Young & Rubicam	201,222	34.1	1,342,627	33.8	27.4	27.3	Young & Rubicam Holdings, London	23.2
6.	Lintas:Worldwide	186,274	49.9	1,242,441	40.0	44.6	44.5	Lintas:Germany, Hamburg/Frankfurt	23.7
7.	J. Walter Thompson Co.	174,580	19.3	1,163,452	19.7	36.1	36.1	J. Walter Thompson Co., London	33.0
8.	BBDO Worldwide	171,412	38.4	1,160,153	38.7	31.9	31.7	Team/BBDO Group, Duesseldorf	25.9
9.	Grey Advertising	151,414	55.2	1,021,986	59.2	41.0	41.5	Grey Ltd., London	35.9
10.	HDM	116,584	42.6	818,628	45.7	57.3	59.3	HDM France, Neuilly	48.6

Figures are in thousands of dollars. *Source:* ADVERTISING AGE.

Backer takes lead in Europe

(Continued from Cover)

position. The London office of Dorland was combined with Backer—forming BSB/Dorland—in March 1988. Most of Dorland's offices in Europe became part of the Backer network in 1987, say Saatchi officials, though competing agencies dispute this claim.

The No. 2 network had 1987 gross income of $229.6 million but a below-average increase of 27.3%.

The fastest-growing network in 1987 was No. 9 Grey Advertising, with a 55.2% increase in gross income to $151.4 million in Europe.

J. Walter Thompson Co.'s 19.3% income growth was the slowest.

Without the boost of the average 15% weakening of the dollar against European currencies, which benefits agencies when European earnings are converted to dollars, JWT would barely have grown in 1987.

In local currency, JWT's billings dropped by 11% in West Germany and by 28% in the Netherlands.

On a network-by-network basis:

• Backer is strongest in Scandinavia, accounting for more than 30% of its European billings, and Germany. The German figures were boosted by Scholz & Friends. The Hamburg agency, majority-owned by Backer, is responsible for almost two-thirds of Backer's German billings.

The three-agency Grupo Bates is No. 1 in Spain but suffered staff and client defections this year from its Grupo Alas.

Backer is weakest in Italy, where it's No. 22. The U.K. agency, once expected to close down, will rank near the top in the U.K. in 1988 because of the Dorland combination.

• Saatchi & Saatchi Advertising's strategy of buying top local creative agencies to spearhead growth has been most successful in Italy, Spain and the Netherlands, where S&S offices are in the top 10 and heading for the top five.

Saatchi is benefiting from a trend toward awarding business on a European basis, often run out of London, such as Gillette Co.'s $30 million Natrel deodorant launch and Johnson & Johnson's $25 million Silhouette sanitary protection brand introduction.

Saatchi led new-business winnings in the U.K. Saatchi added new business totaling $254.4 million in the first six months of '88, compared to $266.3 million for all of 1987 and $231.4 million in 1986.

"To be strong in Europe, you've got to be mega in the U.K.," said Andy Fraser, Saatchi's worldwide new business director.

• Ogilvy & Mather's gain of the $100 million, nine-country Ford Motor Co. business lost by JWT helped its position. O&M has carved out leadership in planning and buying new media. O&M handles new media buying for Unilever, American Express Co. and PepsiCo.

The network's gross income grew most in Portugal (more than 100%), Italy (49.1%) and the Netherlands (48%). O&M's creative profile is highest in the U.K., where it was the only U.S.-owned agency to rank among the top 10 winners of creative awards in 1987.

• McCann-Erickson agencies rank in the top 10 in 12 of 15 European markets, second only to another Interpublic Group of Cos. shop, Lintas:Worldwide.

McCann ranks No. 1 in Italy and Portugal, No. 2 in Spain and Belgium and No. 3 in Germany, despite the loss of the $40 million General Motors Corp. account to sister agency Lowe International in 1986.

McCann's London office mainly wins the U.K. portion of multinational business already handled by McCann in other countries. The network's continental offices are more successful at winning business locally.

• Young & Rubicam agencies rank in the top 10 in 12 of 15 European countries in gross income. Growth was especially strong in Germany (39.6%), Spain (63.2%) and Italy (47.2%).

Y&R has a reputation for winning new business locally rather than relying on accounts from its international network.

• Lintas:Worldwide ranks in the top 10 everywhere except the U.K. and Sweden. Strongest growth was in the Netherlands (97%), Italy (73.8%) and Portugal (78.5%).

Lintas' major problem is its weak U.K. agency, ranked No. 16. The London office is on a perennial hunt for a strong managing director and creative director and has looked for agencies to buy to improve its U.K. operation. Lintas:U.K. lost business last year from three different subsidiaries of Unilever, Lintas' largest client worldwide.

• In the No. 7 slot, JWT is struggling to regain billings after losing $100 million of Ford business and Richardson-Vicks business in Germany, France and other markets. Ford's refusal to allow JWT to seek another car account leaves a gap in JWT's client list.

While JWT's 1987 gross income in Germany grew by 7.9% in dollars, it fell by 11% in local currency. Hardest hit was the Netherlands, with a 12.5% drop in gross income in dollars. The U.K. office continues to be JWT's main strength and gained $90 million in net new business last year. Another $100 million is expected this year. For the first time, JWT appointed a European new-business director to oversee new business activity for the region.

WPP Group-owned JWT's new fill-in strategy is to buy local agencies and combine them with JWT in the markets where JWT is weakest. The acquisition of Dutch agency PPGH in June should put JWT/PPGH in second place in the Netherlands in 1988. Belgian, Austrian and Scandinavian markets, where JWT ranks between No. 10 and No. 27, are in line for acquisitions.

• BBDO Worldwide ranks No. 1 in Germany, Switzerland and the Netherlands, with the combined three accounting for 48% of BBDO's European income.

BBDO is weakest in the U.K., where the agency ranks No. 39 and grew by only 10.3% last year, and in France, where BBDO ranks No. 21 but grew by 56.3%. BBDO is expected to lose its No. 1 slot in Germany to Lintas in 1988 because of BBDO's sale this year of Imparc to D'Arcy Masius Benton & Bowles. Imparc bills about $40 million.

• Grey ranks among the top 10 agencies in only four markets: the U.K., Germany, Denmark and Sweden. Grey grew fastest in the U.K. (82.8%), France (74%), the Netherlands (73.1%) and Italy (70%).

The network's rapid growth came from account gains, especially in the U.K. and Germany, acquisitions in the U.K. and Spain and setting up direct marketing, sales promotion and PR agencies.

• The billings of HDM, jointly owned by France's Havas, Japan's Dentsu and the U.S.' Young & Rubicam, are more heavily concentrated in one country than any other network except Saatchi.

HDM France contributed 48.8% of HDM's European billings in 1987. HDM makes the top 10 in only four countries, ranking No. 4 in France, No. 6 in Belgium, No. 7 in Switzerland and No. 8 in Spain. Fastest growing markets by gross income were France (57.6%), Spain (44%), Italy (42%) and Switzerland (36.4%).#

This story was written by Laurel Wentz in London with contributions from Kevin Brown and Ilse Cermak in Chicago, Dagmar Mussey in Duesseldorf and Marina Specht in Madrid.

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All tressed up for the camera

Debutante and aspiring actress Cornelia Guest graces an outdoor and print campaign breaking this month for haircare products marketer Oggi International. Ms. Guest—whose first motion picture, entitled "Second Sight," will be released this fall—is the first celebrity to appear in Oggi's year-old campaign featuring nude models. David/Scott Advertising, Los Angeles, handles.

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Last Minute News

Weller leaves Riney for Bush

WASHINGTON—Jim Weller, senior VP-executive creative director at Hal Riney & Partners, Los Angeles, is leaving to join the ad team of Vice President George Bush. Jim Travis, president of Riney's New York office, said Mr. Weller quit to join the Republican presidential campaign after being denied a leave of absence. Messrs. Weller, Riney and Travis all worked on the "Tuesday Team" that created advertising for President Reagan in 1984.

Goodby sells stake to Boase

SAN FRANCISCO—Goodby, Berlin & Silverstein has sold a 37.5% interest to Boase Massimi Pollitt, London, for an initial payment of $1.5 million. Any future payments would depend on whether BMP exercises an option to buy an additional stake later. BMP also owns Ammirati & Puris, New York.

Campbell axes soup theme

CAMDEN, N.J.—Campbell Soup Co. is abandoning its "Soup is good food" ad theme to bring back "M'm m'm good" in red-and-white soup advertising breaking this fall. The ads include network TV and print. Campbell, which has said it's returning to the basics in its 1989 marketing plan, said it will also revive the Campbell Kids in new TV spots this fall

(Continued on Page 8)

WSJ's bullish bet

Paper goes to three sections on Oct. 3

By PATRICK REILLY

NEW YORK—*The Wall Street Journal* will embark on one of the biggest gambles in its nearly 100-year history when it unveils a new third section on Oct. 3.

A prototype of the newly reorganized paper shown to ADVERTISING AGE by *WSJ* executives and Norman Pearlstine, the paper's managing editor, reveals that the addition of the third section is part of a subtle though substantial redesign of virtually every part of the nation's largest daily newspaper.

The changes, which create a second section carrying the name "Marketplace" and a third titled "Money & Markets," are part of a long-range plan spearheaded by Mr. Pearlstine to expand *WSJ's* readership by offering increased coverage of professions, such as law and media, and of areas not extensively covered by the paper, such as growing companies, entrepreneurs and high technology.

"We are really expanding the concept of what business news is," Mr. Pearlstine said.

While a three-section *WSJ* has been generally well-received by ad agency executives, some have reservations about reader reaction.

"The open question is how readers will respond. When you go to three sections, there is more to read. Readers are going to either shift time to reading *WSJ* from other publications or add more time to their reading day. But no one knows what they will do," said Michael Drexler, exec VP-national media director at Bozell, Jacobs, Kenyon & Eckhardt.

WSJ executives are aware that readers already are deluged with material. "We don't want the reader to feel there is too much to read," Mr. Pearlstine said. "We want to make the *Journal* easier to read."

"I think the *Journal* has become a chore to read," said Bruce Thorp, media analyst at PNC Financial Corp. The Dow Jones & Co. newspaper went from one section to two in June 1980.

"There is so much good stuff in there," he added. "Not that you need to know it, but it's such enticing reporting [that] it catches your eye. That becomes a time burden."

Another question is the wisdom of making the move during a particularly soft period for financial advertising.

Although the paper's restructuring will offer immediate attractions to advertisers, *WSJ* has suffered substantial losses in its ad linage—and circulation—following the Oct. 19 stock market plunge.

For the six months ended June 30, *WSJ* officials said, circulation was down

(Continued on Page 94)

Burger King plays $140M promo game

By SCOTT HUME

Burger King Corp. is trying for the first time to beat archrival McDonald's at its own game.

The No. 2 hamburger chain plans one of its most ambitious national promotions, a heavily advertised combination instant-win and game-piece effort based on the venerable board game of checkers.

The promotion is expected to start Sept. 30, just as McDonald's Corp. is wrapping up its "When the U.S. Wins, You Win" Olympics promotion.

With a total prize value of $140 million, Burger King's promotional event will be its largest ever.

Sources estimate the chain will put $30 million in ad support behind the game, including a heavy round of network TV spots from N W Ayer. Einson Freeman, Paramus, N.J., created the promotion.

Burger King had hoped to run Checkers earlier in the year, but a combination of the revival of McDonald's Monopoly game in April and a reported inability to convince franchisees to approve the game forced the delay until fall (AA, April 4).

The new promotion couldn't come at a more opportune time for New York-based Ayer, Burger King's beleaguered national ad agency.

Philip Smith, new chairman-ceo of Pillsbury Co., Burger King's parent, last week promised that shareholders will see more effective advertising from the chain this fall *(see related story on Page 93)*.

The Checkers promotion is Burger King's chance to prove to its uneasy franchise owners, wary parent company, doubting securities analysts and frustrated consumers that it can do a professional job in the marketing arena.

Burger King currently is resisting the idea of totally regionalized marketing through regional agencies, a strategy that would hurt Ayer.

If Checkers is a hit, it's a victory for centralized, national marketing—and Ayer.

Burger King officials declined to discuss the promotion, which they intend to announce at a news conference in Miami on Sept. 26 (AA, Sept. 5).

In many ways, the Checkers game mirrors McDonald's Monopoly II promotion from earlier this

(Continued on Page 94)

WHAT NEXT, RON?

Cosby, Reagan, Hope top celeb survey

By SCOTT HUME

Another career awaits President Ronald Reagan when he relinquishes the free world's top job in January. And it's a line of work he's already had a fair amount of experience and success in: celebrity spokesman.

That may sound farfetched, but one Hollywood "celebrity broker" said he already has three firm offers for the president's future services in advertising.

Although he's not even out of office yet, President Reagan was runner-up to comedian Bill Cosby in a survey in which adults nationwide were asked to name the person they considered the best celebrity spokesman.

The survey was conducted for ADVERTISING AGE by the SRI Research Center, Lincoln, Neb.

As the pitchman for Coca-Cola, Kodak film and processing, and Jell-O pudding and frozen desserts, Mr. Cosby certainly is among the most visible of celebrity presenters (though sportscaster John Madden is coming on strong, as if another of those clunky championship rings were going to be awarded to the person logging the most airtime).

Products aside, A.C. Nielsen Co. TV ratings attest to the fact Mr. Cosby also is one of the most pop-

(Continued on Page 98)

Illustration by David Klein

Dukakis to alter two-team ad lineup

Hancock exec accepts role of liaison between ad teams

By STEVEN W. COLFORD

Presidential candidate Michael Dukakis' unusual two-team ad structure is floundering, and the candidate is turning to the man who supervised John Hancock Mutual Life Insurance Co.'s "Real life/real answers" campaign for some answers.

The assignment to David D'Alessandro, Hancock's corporate sector president and former senior VP-corporate communications, is to serve as a liaison between the Democrat's presidential campaign staff and the group of Madison Avenue executives who form the Future Group.

Indications are the heralded two-team ad structure devised for the Massachusetts governor isn't working.

When the Dukakis group was put together by pollster Thomas Kiley and campaign adviser Francis O'Brien, it was to consist of two distinct teams—one composed of political advisers to handle tactical, quick-response ads; and the other, made up mostly of commercial admen, to handle strategic and "big picture" commercials.

But the advertising produced to date generally is regarded as uninspired and not in sync with what the candidate himself is talking about. The reason could be a lack of communication and coordination between the two groups.

Mr. D'Alessandro was unavail-

(Continued on Page 94)

Jackson, Cosby are sought for black-oriented campaign

By STEVEN W. COLFORD

WASHINGTON—The Rev. Jesse Jackson is being courted by Michael Dukakis' minority ad team to appear in TV commercials for the Democratic presidential nominee.

If the Rev. Jackson agrees, he'll become part of a multimillion-dollar campaign targeting black voters that broke last week.

Also being courted are celebrities Bill Cosby, who appeared in commercials for the Rev. Jackson's primary race against Massachusetts Gov. Dukakis, and Harry Belafonte.

"Scheduling problems" are the biggest obstacle to corralling the Rev. Jackson, said Sam Chisholm, president of the Mingo Group, New York, the agency handling the black-oriented campaign.

The first ads broke last week on radio and in 150 newspapers.

TV spots, still being shot, are planned to start this week. They

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Jergens believes the timing couldn't be better for introducing its new EverSoft lotion.

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Advertising and consumer groups are clashing over how the trademark law should be revised.

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Now that Silk Cut has perfected advertising that mentions neither smoking nor the brand name, its U.K. campaign is being exported across Europe.

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Chrysler is heavying up on Jeep advertising as rivals challenge Jeep's traditional advantages.

81 **Cadillac to boost spending**
General Motors Corp.'s Cadillac division will tout its new big cars with its largest ad budget ever.

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Calvillo, Shevack & Partners has been renamed Partners & Shevack, as agency executives get an equity interest in the business.

90 **Polaroid focuses on kids**
Polaroid is touting the Cool Cam camera, its first attempt to target the youth market since the '60s.

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60 **AmEx charges ahead**
American Express Co. is stepping up its promotional activities in Seoul to counter Visa International's high visibility during the Summer Olympics, garnered from Visa's Olympics sponsorship.

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Ads go regional

Chevrolet gets Geo-graphical

By RAYMOND SERAFIN

LAS VEGAS, NEV.—A marketplace creative shoot-out could be shaping up for fall as Chevrolet uses two approaches and two agencies in regional launches of its new Geo brand.

The two different campaigns were created by national agency Lintas:Campbell-Ewald, Warren, Mich., and by Chevy's West Coast regional agency, Vic Olesen & Partners, Culver City, Calif.

Geo represents the General Motors Corp. division's attempt to lure hard-core import buyers by using the new name and separate showroom sales areas for small cars and trucks imported or built in joint ventures with Japanese companies (AA, March 28).

Initially, Chevrolet intends to use the Olesen campaign on the West Coast and the Lintas:Campbell-Ewald campaign everywhere else. But General Marketing Manager Mike Erdman said in an interview at Chevrolet's media preview here that the Olesen ads will run in one non-West Coast market and the other ads will appear in one West Coast market.

Jeep rolls new ad plans—P. 80
Cadillac unveils new spots—P. 81

The first regional spots break in October, and the Lintas:Campbell-Ewald campaign will run nationally in November. But the big ad push won't start until next spring, when a full line of four models is available to dealers.

Chevrolet decided to run the two campaigns in different areas "just to

(Continued on Page 94)

Hurricane Gilbert comes as blow to Texas ad people

By JENNIFER LAWRENCE and CHRISTY FISHER

Hurricane Gilbert's uncertain path frightened the Texas advertising community well before the huge, dangerous storm was expected to hit landfall last Friday night.

Local newspapers scrambled to prevent advertisers from pulling weekend ads while some ad agencies rushed to meet Friday deadlines ahead of schedule.

In Houston, N W Ayer transferred work to its New York office to keep up with client Continental Airlines' deadlines.

Celebrities were affected, too. Calvin Klein canceled a personal appearance at Macy's Houston Galleria store for his new fragrance, Eternity. The Sept. 17 Liza Minnelli, Frank Sinatra and Sammy Davis Jr. "Ultimate Event" concert was postponed until Oct. 9.

The pending storm wasn't bad news for all, however. Some advertisers used Gilbert to boost business.

Stewart & Stevenson, a Houston-based power equipment specialist, lost no time in running a newspaper ad in Houston and Corpus Christi, headlined "Hurricane Alley," to

(Continued on Page 94)

SPECIAL ADVERTISING SUPPLEMENT:
Consumer Magazine Directory
begins after Page 51.

August consumer magazine ad linage

	Current month 1988	Current month 1987	Year-to-date 1988	Year-to-date 1987
■ Auto/cycle/rec. vehicles				
ATV Sports	22.1	43.3	239.8	548.8
Autoweek (52X)	167.7	155.6	1,326.1	1,195.3
Car & Driver	93.6	90.2	830.4	758.0
Car Collector & Car Classics	15.8	18.0	131.1	136.5
Car Craft	80.5	86.0	679.8	695.0
Circle Track	74.6	71.0	665.7	607.8
Cycle	31.4	38.3	364.8	398.5
Cycle World	41.8	35.3	398.5	434.4
Dirt Rider	31.2	34.0	314.5	285.7
Dune Buggies & Hot VWs	72.7	78.7	599.5	613.0
Family Motor Coaching	144.0	144.4	1,391.5	1,254.6
4 Wheel & Off-Road	102.2	94.9	705.4	706.6
Four Wheeler	93.0	91.0	719.0	691.0
Hot Rod	74.8	65.0	727.0	605.9
Motorcyclist	30.0	38.9	382.1	418.8
Motor Trend	65.3	63.0	652.8	636.6
Motorhome	99.3	96.4	730.7	683.8
Rider	30.1	36.3	325.7	360.2
Road & Track	80.7	97.3	826.5	826.4
Trailblazer	76.0	76.0	439.2	400.6
Trailer Life	106.8	103.5	775.1	837.6
Total Group	**1,533.6**	**1,557.0**	**13,225.2**	**13,095.1**
% change	**-1.5%**		**1.0%**	
■ Boating & yachting				
Boating	100.9	111.5	1,262.0	1,220.4
Chesapeake Bay	44.3	41.0	393.1	354.1
Cruising World	82.3	89.0	883.9	899.0
Lakeland Boating (11X)	68.0	68.5	657.4	588.1
Motor Boating & Sailing	106.6	120.2	1,273.7	1,319.5
Sail	134.6	107.4	870.1	872.7
Small Boat Journal(6X)	—	—	—	—
Trailer Boats(11X)	37.1	36.8	539.9	467.6
Western Boatman(6X)	—	—	209.7	155.3
Yachting	136.7	135.4	1,138.6	1,131.4
Total Group	**710.6**	**709.8**	**7,228.4**	**7,006.1**
% change	**0.1%**		**3.1%**	
■ Civic/fraternal				
American Legion	31.1	28.1	258.8	249.6
Elk (10X)	15.0	16.0	118.3	137.8
Kiwanis	15.2	15.4	97.8	122.5
Lion (10X)	—	—	43.1	56.5
Rotarian	16.5	11.7	120.7	114.2
V F W (11X)	21.5	24.5	196.1	218.0
Total Group	**99.3**	**95.7**	**834.8**	**898.6**
% change	**3.8%**		**-7.1%**	
■ General				
American Health (10X)	—	—	437.0	447.2
American Heritage (8X)	—	—	172.6	140.6
American West (6X)	22.0	30.2	130.8	147.5
The Atlantic A	20.1	18.8	324.2	252.9
Bon Appetit A	67.7	73.2	595.9	625.4
Cable Guide	31.2	16.6	244.6	164.1
Changing Times	32.6	43.7	428.9	483.6
Conde Nast's Traveler	35.9	—	371.1	—
Connoisseur	33.0	43.8	586.7	522.9
Consumers Digest (6X)	—	—	85.3	87.0
Ebony	94.1	90.2	802.2	724.7
Fifty Plus	20.0	30.6	233.0	303.0
Finance (10X)	—	—	223.9	302.1
Food & Wine	35.5	46.1	389.8	422.9
Games (6X)	—	—	—	—
Golden Years	40.7	26.1	254.6	218.9
Gourmet	63.9	67.2	731.8	730.4
Harper's Magazine A	31.9	24.5	253.6	232.4
Harrowsmith (6X)	—	—	218.0	185.6
Let's Live	36.0	37.0	388.0	357.0
Life	87.0	28.3	444.3	335.1
Modern Maturity (6X)	30.5	35.0	136.6	177.7
Money	69.0	77.4	858.5	941.1
Money Maker	7.5	10.0	32.7	28.8
National Geographic	13.6	14.8	181.0	153.5
National Geographic Traveler (4X)	—	—	83.8	86.0
Natural History	23.6	24.6	284.9	259.7
Prevention	42.2	56.1	437.0	495.6
Psychology Today	—	—	207.0	212.6
Reader's Digest A	64.6	55.8	770.7	705.6
Saturday Evening Post (9X)	—	—	178.5	210.6
Smithsonian	52.4	67.2	649.6	611.6
Town & Country	93.9	113.0	904.8	881.2
Travel-Holiday	37.8	38.9	417.3	419.2
Travel & Leisure	45.5	45.4	799.2	716.9
Vanity Fair	92.9	72.4	628.3	437.8
Writer's Digest	23.6	27.4	233.6	219.9
Yankee	56.0	58.2	571.2	579.8
Total Group	**1,304.7**	**1,272.3**	**14,691.0**	**13,817.0**
% change	**2.5%**		**6.3%**	
■ Home				
Americana (6X)	14.0	11.7	66.2	80.9
Architectural Digest A	103.4	93.4	1,080.3	917.5
Better Homes & Gardens	90.6	84.0	879.2	830.6
Colonial Homes (6X)	48.9	52.1	227.0	236.9
Columbus Monthly-Homes (4X)	—	—	114.9	86.9
Country Home (6X)	41.3	51.3	196.9	200.6
Country Living	67.1	75.3	670.6	656.9
Family Handyman (10X) A	—	—	309.0	372.3
Florida Home & Garden	83.8	36.4	513.3	326.5
Flower & Garden (6X)	31.9	33.3	176.9	172.4
Home	48.0	40.7	449.0	402.7
Home Mechanics	32.2	47.5	398.0	446.4
The Homeowner (10X)	—	—	212.5	210.9
Horticulture	24.8	23.5	323.2	296.4
House Beautiful	41.5	56.7	493.9	534.0
House & Garden	54.1	54.5	669.4	690.4
Metropolis	—	—	378.7	361.0
Metropolitan Home	56.2	46.6	636.7	484.7
1,001 Home Ideas	45.5	39.2	425.4	382.9
Organic Gardening	21.6	27.5	362.4	393.5
Phoenix Home/Garden	61.5	59.5	576.5	553.6
Practical Homeowner	—	—	262.1	282.1
San Diego Home/Garden	57.5	49.0	573.9	528.1
Southern Accents (6X)	—	—	428.2	357.9
Southern Living	83.2	80.9	956.8	920.5
Sunset Magazine A	77.8	92.8	969.2	941.3
Workbench (6X)	—	—	153.7	180.7
Total Group	**1,084.9**	**1,055.8**	**12,503.8**	**11,848.6**
% change	**2.8%**		**5.5%**	
■ In-flight & other passenger				
Aboard Group (7X)	—	—	137.2	105.6
Alaska Airlines	53.9	53.6	442.1	435.2
America West Airlines	50.8	53.2	482.5	365.2
American Way (24X)	107.9	101.9	1,013.6	777.0
East/West Network:				
Continental	48.7	—	369.8	—
Eastern Review	48.5	53.3	417.7	535.0
Northwest	35.3	47.2	312.6	354.0
Pan Am Clipper	44.5	35.2	347.4	320.8
Spirit	50.3	53.2	478.2	460.9
TWA Ambassador	36.5	45.0	351.4	379.1
Vis `A Vis	63.6	53.0	427.9	445.8
Halsey Publication:				
Delta Sky	61.9	69.2	622.4	613.2
Pace Communications:				
Piedmont Airlines	100.9	105.2	748.1	695.2
US Air	41.5	52.3	466.5	378.9
Spirit of Aloha (6X)	20.0	29.4	143.0	215.4
Total Group	**764.2**	**751.6**	**6,760.3**	**6,081.3**
% change	**1.7%**		**11.2%**	
■ Men's				
Esquire A	72.3	59.5	676.3	638.7
Firehouse Magazine	66.5	52.3	357.7	344.6
Gentlemen's Quarterly A	146.7	141.6	1,152.6	1,016.6
M Magazine	53.7	69.7	510.6	517.0
Muscle & Fitness	112.0	128.0	967.8	974.3
Penthouse A	30.5	31.5	342.8	320.4
Playboy A	34.6	47.6	409.3	409.3
Salute (10X)	—	—	165.7	122.9
Total Group	**516.3**	**530.2**	**4,582.7**	**4,343.7**
% change	**-2.6%**		**5.5%**	
■ Metropolitan				
Aloha (6X)	26.8	56.5	106.4	143.4
Atlanta	70.7	50.8	536.5	444.3
Baltimore	70.2	56.4	535.6	545.1
Boston	152.9	173.5	1,171.1	1,219.4
California	64.4	68.9	482.2	461.7
Chicago	101.8	75.8	786.6	773.3
Chicago's North Shore	91.1	94.3	701.7	652.7
Cincinnati	46.5	81.8	364.6	484.8
Cleveland	54.0	62.9	462.0	544.4
Coast (39X)	227.7	344.0	1,495.0	1,822.9
Columbus Monthly	54.2	67.7	548.9	530.4
Connecticut	107.6	112.3	800.7	765.3
D Magazine	66.0	82.8	649.2	837.2
Denver	28.0	31.3	269.3	271.7
Detroit Monthly	66.1	44.3	637.9	470.1
Grand Rapids	31.2	33.0	295.0	303.2
Gulfshore Life (10X)	65.0	63.0	594.0	554.0
Honolulu	72.3	101.0	459.9	487.8
Houston Metropolitan Mag	49.7	75.6	465.3	565.8
Louisiana Life	—	—	130.7	141.2
Madison	34.7	61.5	276.7	507.0
Memphis	149.5	143.0	675.0	644.0
Mid Atlantic Country	47.4	32.0	271.1	280.1
Milwaukee	67.0	65.3	430.4	465.4
Minneapolis/St. Paul	103.0	92.5	775.0	800.0
Nashville	33.0	65.0	355.0	346.0
New England Monthly	42.3	36.6	370.3	345.7
New Jersey Monthly	110.5	106.0	783.0	702.9
New Mexico	52.9	45.2	315.1	252.8
Ohio	44.7	48.9	418.0	438.0
Orlando	72.2	84.5	687.3	732.1
Palm Beach Life	43.1	35.5	486.5	499.0
Palm Springs Life	36.8	36.9	795.0	753.3
Philadelphia	141.4	122.8	1,120.2	1,107.2
Phoenix	—	—	—	—
Pittsburgh	62.7	63.8	559.0	529.3
St. Louis	30.9	67.0	353.1	459.1
San Diego	139.8	120.1	1,320.0	1,212.3
San Francisco Focus	104.6	111.5	722.6	729.7
South Florida Magazine	86.2	49.2	561.8	424.5
Texas Monthly	73.9	82.9	705.6	733.0
Twin Cities	64.1	55.5	544.4	487.2
The Virginian (6X)	—	—	241.8	236.6
Washington (7X)	65.0	59.5	280.7	240.5
The Washingtonian	143.5	145.6	1,155.3	1,135.4
Total Group	**3,195.1**	**3,406.6**	**25,695.5**	**26,080.0**
% change	**-6.2%**		**-1.5%**	
■ Music/entertainment				
Audio	74.6	63.0	641.4	613.4
Dance Magazine	38.4	39.1	425.7	481.0
Playbill	44.8	44.4	391.1	348.6
Video Magazine	—	—	—	—
Total Group	**157.8**	**146.5**	**1,458.2**	**1,443.0**
% change	**7.7%**		**1.1%**	
■ Outdoor & sport				
Alaska	28.4	28.8	279.4	278.6
The American Handgunner (6X)	—	—	202.0	182.0
American Hunter	25.3	28.1	169.2	145.2
American Rifleman	26.8	25.0	191.7	180.9
Bass Master (10X) A	—	36.1	581.1	502.9
Bicycling (9X)	101.0	71.3	878.0	690.6
Ducks Unlimited (6X)	—	—	94.1	101.6
Field & Stream	32.9	50.5	637.5	657.5
Fins & Feathers A	—	—	—	—
Fishing World (6X)	—	—	168.6	169.4
Florida Sportsman	101.7	95.2	1,058.5	1,011.9
Golf Digest	64.2	77.6	900.1	833.8
Golf Illustrated	30.3	31.8	216.3	187.6
Golf Magazine	41.8	58.7	806.0	658.7
Gun Dog (6X)	—	—	136.2	122.0
Guns	37.0	39.0	278.0	244.0
Guns & Ammo	44.1	45.8	363.2	347.2
In-Fisherman (6X)	—	—	—	—
Outdoor Life	43.1	60.1	588.3	624.1
Outside Magazine	39.6	46.2	455.6	412.8
Petersen's Hunting	44.5	57.5	349.8	366.8
Runner's World (12X)	27.7	35.2	267.6	292.1
Salt Water Sportsman	71.8	58.8	990.3	879.9
Sierra (6X)	—	—	159.2	148.2
Shooting Times	—	—	—	—
Ski (8X) A	—	—	293.4	252.2
Skiing (7X) A	—	—	263.1	203.3
Skin Diver	121.7	100.9	949.0	861.7
Southern Outdoors (9X)	—	—	374.2	302.6
Southern Saltwater(8X)	—	22.4	237.1	196.2
Sport Magazine	28.8	46.9	287.4	318.6
Sports Afield	48.3	53.8	582.3	657.2
Tennis	52.9	49.8	594.3	566.4
Waterski (8X)	—	—	—	—
Western Outdoors (10X)	30.4	35.6	318.0	315.9
Wildfowl (6X)	33.3	22.5	77.0	52.1
WindRider	49.6	50.0	323.3	271.5
Wing & Shot (6X)	—	—	57.6	44.6
World Tennis	38.8	31.5	427.8	244.3
Total Group	**1,164.1**	**1,259.2**	**14,555.0**	**13,324.6**
% change	**-7.6%**		**9.2%**	
■ Photography				
American Photographer	31.7	36.1	237.1	291.1
Petersen's Photographic	26.4	18.9	202.9	210.7
Popular Photography	74.0	85.3	625.4	568.9
Total Group	**132.0**	**140.3**	**1,085.4**	**1,070.7**
% change	**-5.9%**		**-0.5%**	
■ Science/electronic/mech				
Discover	27.2	30.5	277.3	341.7
Home Office Computing	25.2	28.2	327.5	325.9
Omni	46.5	41.8	466.5	445.6
Personal Computing	141.7	149.5	1,697.9	2,282.5
Popular Mechanics	59.3	53.6	626.1	685.8
Popular Science	42.2	47.2	528.6	538.4
Scientific American	19.3	29.5	299.3	325.3
Spectrum	34.5	58.3	447.3	505.1
Total Group	**396.0**	**438.6**	**4,670.4**	**5,450.2**
% change	**-9.7%**		**-14.3%**	
■ Woman/fashion/service				
Beauty Digest (6X)	31.0	11.3	89.3	39.0
Bride's Magazine (6X) A	565.4	560.8	2,069.9	1,833.1
Cosmopolitan A	173.5	196.4	1,499.3	1,524.3
Elle Magazine	175.6	140.1	1,255.0	1,129.1
Essence	68.6	69.5	592.3	605.5
Family Circle (17X) A	114.1	166.4	1,086.0	978.7
Glamour	197.6	195.7	1,309.8	1,382.8
Good Housekeeping A	98.1	109.0	948.1	1,046.5
Harper's Bazaar	102.6	107.1	792.1	889.6
Health	26.5	40.6	292.2	359.5
Ladies' Home Journal	98.4	85.9	828.6	764.9
Mademoiselle	119.1	161.6	1,124.2	1,091.8
McCall's	75.7	75.1	596.6	706.9
Military Lifestyle (10X)	—	—	333.0	323.6
Modern Bride (6X)	490.7	478.5	1,637.9	1,544.5
Ms	21.0	—	239.2	312.4
New Woman	66.3	73.6	653.2	627.0
Parents Magazine A	116.9	119.9	935.3	822.6
Redbook	71.8	71.1	734.5	725.6
Savvy	30.5	27.5	318.1	268.1
Self	85.6	89.3	770.8	751.2
Seventeen	302.8	250.0	1,018.9	1,013.2
Shape	66.4	64.5	563.5	559.1
Soap Opera Digest (26X)	20.0	21.4	180.4	164.8
Soap Opera Update	5.0	—	77.5	—
Teen Magazine	102.1	84.6	435.5	456.2
True Story A	46.8	47.8	367.6	372.5
Vogue	244.3	253.9	1,811.0	1,812.4
Weight Watchers	23.2	27.8	257.4	247.8
Woman (10X)	43.0	36.0	261.6	205.0
Woman's Day (15X) A	90.7	86.7	952.6	952.9
Workbasket	23.7	24.3	175.4	214.7
Working Mother	86.9	90.4	561.2	618.0
Working Woman	57.1	69.1	700.5	719.7
Total Group	**3,840.8**	**3,835.8**	**25,468.4**	**25,063.0**
% change	**0.1%**		**1.6%**	
■ Youth				
Boys' Life	12.1	13.2	122.6	115.3
Campus Life (10X)	—	—	245.1	239.7
Total Group	**12.1**	**13.2**	**367.7**	**355.0**
% change	**-8.2%**		**3.6%**	
■ Business/national				
Barron's	146.1	191.6	1,414.2	1,624.1
Black Enterprise	42.4	49.0	637.1	580.4
Business Month	—	—	275.5	184.2
Business Week (52X) A	240.6	232.2	2,588.4	2,615.1
Financial World (26X)	46.5	44.2	435.1	468.4
Forbes (26X)	124.5	133.5	1,900.1	2,072.6
Fortune (26X)	300.8	255.8	1,875.8	1,751.9
Frequent Flyer	30.3	47.0	369.5	446.3
Futures	46.6	41.5	439.0	335.8
Inc. Magazine	81.6	57.6	714.9	665.0
Income Opportunities	—	—	580.9	502.6
Industry Week (25X) A	83.2	97.6	625.2	612.0
Nation's Business (12X) A	22.5	20.2	267.1	233.5
Venture	47.9	50.5	417.0	493.8
Total Group	**1,213.0**	**1,220.6**	**12,539.8**	**12,585.7**
% change	**-0.6%**		**-0.4%**	
■ Business/regional				
Advantage-Nashville's Bus. Mo.	32.0	56.0	372.0	444.0
Arizona Bus. Gazette (52X)	47.4	57.3	520.4	553.4
Baltimore Bus. Jrnl	71.7	77.8	653.2	633.2
Boston Bus. Jrnl (52X)	86.2	100.5	993.8	1,047.0
Bus. First of Buffalo	74.8	59.8	535.9	477.5
Bus. First of Columbus	—	—	—	—
Bus. Jrnl.-Milwaukee	114.8	143.6	1,042.6	975.1
Bus. Jrnl.-Sacramento	74.1	84.0	575.6	506.1
Bus. North Carolina	28.0	48.5	313.0	351.2
Capital Dist. Bus. Review (52X)	88.6	68.7	676.2	639.2
Caribbean Business	162.0	153.0	1,100.0	1,133.0
Corporate Rpt. Kansas City	20.1	14.1	155.4	164.9
Corporate Rpt. Minnesota	57.0	58.0	564.0	578.0
Crain's Chicago Bus. (52X)	146.4	145.0	1,157.4	1,143.0
Crain's Cleveland Bus. (52X)	79.2	73.6	538.9	472.9
Crain's Detroit Bus. (52X)	80.8	89.7	611.9	598.0
Crain's New York Bus. (52X)	34.0	31.0	374.0	280.0
Florida Trend (13X)	41.7	53.3	505.6	609.3
Georgia Trend	36.8	41.1	446.9	521.0
Grand Rapids Bus. Jrnl	62.4	66.5	417.5	364.9
Hawaii Business	110.2	79.4	390.8	381.6
Houston Bus. Jrnl (52X)	74.0	85.8	503.5	520.0
Indianapolis Bus. Jrnl (52X)	171.9	147.5	1,185.9	1,089.0
Manhattan Inc.	39.6	54.6	446.1	542.5
New England Bus. (20X) A	46.4	44.8	413.6	562.1
New Orleans City Bus.	70.8	81.6	390.8	444.3
Pacific Bus. News (52X)	118.9	136.2	843.4	934.5
Pittsburgh Bus. Times (52X)	102.3	89.1	907.3	908.2
Providence Bus. News	121.5	67.3	673.9	490.0
Regardie's/Washington Review Publication:	194.0	136.0	1,145.0	1,087.0
Broward Review	92.1	28.7	446.2	256.9
Miami Review	75.4	36.1	475.8	365.7
Palm Beach Review	73.7	21.4	399.7	186.4
San Jose Bus. Jrnl	—	—	—	—
South Florida Bus. Jrnl	36.7	75.6	511.2	759.7
St. Louis Bus. Jrnl. (52X)	128.2	127.9	900.5	1,002.3
Warfield Monthly Baltimore	50.8	50.0	542.0	491.8
Total Group	**2,844.5**	**2,683.6**	**21,729.7**	**21,513.5**
% change	**6.0%**		**1.0%**	
■ National Sunday mags				
Parade (52X)	42.6	47.4	430.3	382.2
USA Weekend (52X)	38.0	37.3	373.1	305.4
Vista Magazine	16.0	14.7	125.7	90.8
Total Group	**96.6**	**99.4**	**929.0**	**778.5**
% change	**-2.8%**		**19.3%**	
■ Newspaper Sunday magazine				
Boston Globe	170.5	240.7	1,471.8	1,614.6
Chicago Tribune	83.8	71.4	800.7	802.2
Cleveland Plain Dealer	58.8	62.8	491.1	459.1
Columbus Dispatch	20.4	44.9	227.1	292.1
Detroit Free Press	44.4	50.1	389.2	389.7
Detroit News	—	—	—	—
L.A. Times	52.3	46.1	504.0	451.7
Louisville Courier-Jrnl	29.0	36.0	264.0	393.0
New York Times Mag	289.2	374.9	2,377.8	2,411.8
Philadelphia Inquirer	88.2	59.2	672.0	514.0
Seattle Times	75.0	66.0	533.0	442.0
St. Louis Post Dispatch	84.4	80.4	586.2	554.9
Toledo Blade Magazine	38.9	38.6	261.8	315.3
Washington Post	114.4	82.2	970.5	958.6
Total Group	**1,149.3**	**1,253.3**	**9,549.2**	**9,599.0**
% change	**-8.3%**		**-0.5%**	
■ Weeklies/bi-weeklies				
The Advocate (26X)	230.4	119.5	1,337.6	1,056.1
Army Times Military Group:				
Air Force Times (52X)	157.3	154.8	1,271.9	1,277.4
Army Times (52X)	153.0	152.1	1,217.0	1,254.4
Navy Times (52X)	170.1	178.2	1,391.4	1,401.5
The Blood-Horse (52X)	208.2	325.8	2,277.0	2,825.7
Capper's (26X)	25.8	15.2	181.4	219.1
Commonweal (22X)	3.7	3.3	47.5	60.4
Golf World (43X)	122.5	92.7	936.3	824.3
Grit (52X) A	22.9	23.2	220.2	220.3
National Journal (50X)	50.0	43.0	554.0	491.5
National Review (25X)	32.4	23.2	266.3	244.1
New Republic (48X)	59.9	27.9	313.0	292.4
New York Magazine (50X)	204.6	199.5	1,794.4	1,802.3
New Yorker	103.3	129.5	1,290.2	1,376.7
Newsweek (52X) A	166.1	160.2	1,468.0	1,538.1
People (51X)	263.7	268.0	2,180.8	2,135.6
Rolling Stone (25X)	142.1	152.0	1,133.4	1,019.9
Sporting News (52X)	54.4	52.1	385.2	401.2
Sports Illustrated (52X)A	204.6	201.4	1,821.2	1,642.4
Time (52X) A	147.5	132.4	1,480.8	1,487.1
Travelhost (52X) C	3,707.0	3,698.0	25,347.0	25,034.0
TV Guide (52X) A	148.6	217.7	2,081.3	2,204.7
US Magazine (26X)	44.4	38.9	397.5	361.5
U.S. News & World Report (50X) A	101.3	117.0	1,091.5	971.8
Total Group	**6,523.6**	**6,525.5**	**50,486.8**	**50,142.5**
% change	**0.0%**		**0.7%**	

NOTES: (X) represents the number of times published each year; publications are monthly unless otherwise specified. A. Sectional linage included but prorated to circulation of regional editions. B. Sectional linage included but not prorated to circulation of regional editions. C. Combined unduplicated regional ads. All figures represented in this table are supplied by the magazines. AD AGE makes no attempt to verify them and therefore is not responsible for inconsistencies or errors.